



## Training Manual, Volume 1

Date: August 22, 2011

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## ADDING A VOLUNTEER OR EMPLOYEE TO SMART-TRAK

The screenshot displays the Smart-TRAK Management System interface. On the left, the 'Smart-Trak Tools' sidebar includes links for Smart-Trak Administration (1), Send Training Invite, Email Tool, Manage, Application Queues (594), Reports, Tutorial Videos, and Customer Support. Below this is a 'Search' tool (2) with radio buttons for 'Church' and 'Conference', input fields for 'Name', 'Date of Birth', and a 'Decision Status' dropdown, along with 'Reset' and 'Search' buttons. The main area shows the 'Smart-Trak Administration' page (3), which has links for 'Add a Single Person' and 'Import a Group'. A table (4) lists individuals with columns for Name, Church, DOB, Phone, Email, Active, and Decision. A 'Decision Key' at the bottom explains the status icons: Pending (yellow circle), Approved (green checkmark), Approved with Conditions (yellow checkmark), Dormant (red circle), and Denied (red X).

Name	Church	DOB	Phone	Email	Active	Decision
<u>PETERSEN, ULRIC</u> Male <small>NEW</small>	Oklahoma Methodist Conference Clergy		10817 SE 51ST ST		Yes	
<u>LOCKWOOD, ANDREW</u> <u>PETERSON</u> <small>NEW</small>	Wewoka United Methodist Church	Apr 04 1981	4052573105		Yes	
<u>Peters, MICHELLE</u> <u>Colleen</u> <small>NEW</small>	Tulsa St Matthew's United Methodist Church	Oct 17 1959			Yes	
<u>PETERSON, Karen</u> <u>JEAN</u> <small>NEW</small>	Tulsa Boston Ave United Methodist Church	Jan 21 1948	4056990124		Yes	
<u>Peterson, JAN</u> <u>Erwin</u> <small>NEW</small>	Tulsa Asbury United Methodist Church	Aug 24 1971	9183921154		Yes	
<u>PETERS, BRETT KAY</u> <small>NEW</small>	Seminole United Methodist Church	Sep 22 1947	4052736771		Yes	
<u>PETERSEN, KAYLA</u> <u>RALPH</u> <small>NEW</small>	OKC Sunny Lane United Methodist Church	Dec 27 1953	4054737951		Yes	
<u>PETERSON, Cassidee</u> <u>PAULINE</u> <small>NEW</small>	Fort Gibson United Methodist Church	Jun 12 1972	9184784134		Yes	
<u>Peterson, Laura</u> <u>Lynne</u> <small>NEW</small>	Beaver United Methodist Church	Aug 01 1981	5806254514		Yes	
<u>PETERS, DIANNER</u>	Oklahoma Methodist Conference Clergy	Jan 29 1958	405-360-6241		Yes	
<u>PETERS, CHERYL</u> <small>NEW</small>	Oklahoma Methodist Conference Clergy	Oct 05 1947	9187434163--		Yes	

**Decision Key:**

- Pending
- Approved
- Approved with Conditions
- Dormant
- Denied

**1 | Smart-TRAK Tools** The Smart-TRAK Tools box allows you to navigate through the Smart-TRAK system with ease. From here, you can navigate to the various Tools that the Smart-TRAK system offers. To access your employee and volunteer information, select the Smart-TRAK Administration link. You should automatically be directed to this page upon log-in.

**2 | Search Tool** The search tool allows you to locate employees and volunteers within your church, or within the Conference.

**3 | Smart-TRAK Administration** The Smart-TRAK Administration page houses all employee and volunteer information that is entered into the system. From this page, you may enter individual volunteers or employees, or import a group of employees and volunteers from a .CSV file. [Click here to learn how to enter an individual applicant or upload a group of people.](#)

**4 | Profile** The volunteer or employee profile includes all information related to that applicant. In addition to storing their contact and vital information, the profile allows you to add notes specific to that individual, approve or decline the individual for work within certain interest groups, send invitations for training or events, and communicate directly with the individual via the email tool. [Click here to view a sample profile.](#)

## ADDING AN INDIVIDUAL PROFILE TO SMART-TRAK

**1 | Add / Edit Profile** To add a single volunteer or employee to your Smart-TRAK Administration database, select the 'Add a Single Person' link from the Smart-TRAK Administration home page.

Upon selecting this link, a window will be opened that will allow you to add a single profile. Complete the provided fields and select the save button. The window will close and your individual will be added to the Smart-TRAK Administration home page.

**2 | Upload Group** To add a group of volunteers or employees from a .CSV file, select the 'Import a Group' link from the Smart-TRAK Administration home page.

*Upon selecting this link, you will be redirected to another page which will outline the instructions for uploading a .CSV file.*

Once you have uploaded your .CSV file, the system will verify that all information has been entered and will alert you to any duplicate emails within your file. Select the 'complete' button and you will be redirected to the Smart-TRAK Administration home page, where your applicants will be added to your queue.

### Upload Group

**NOTE:** Each line within the .CSV file **MUST** be in the following format:

FirstName, LastName, Email, MiddleName, Gender, PhoneNumber, Address1, Address2, City, State, Zip Code, Social Security Number, Date of Birth, Number of Children, Marital Status.

**NOTE:** Do not include headers as the first row of the CSV file.

**First Name, Last Name, and Email Address ARE REQUIRED FIELDS.**

All other fields are optional and can be left blank. Below are examples of valid CSV strings:

- Jane, Doe, jane@mail.com

	A	B	C
1	Jane	Doe	jane@mail.com

- George, Smith, george@mail.com, M, 918-777-5555, 7100 N. Somewhere Dr., Apt. #3333, Tulsa, OK, 74133, 123-45-6789, 1/1/1980, 3, Single

Upload CSV:

Browse


2

Upload

Finish

## VIEWING AND EDITING AN INDIVIDUAL PROFILE IN SMART-TRAK

**Sarah Smith - sarah.smith@gmail.com**  
Approved on 8/17/2011



[Update Profile Picture](#)

[7131 Riverside](#)  
[Tulsa OK 74136](#)  
[sarah.smith@gmail.com](#)  
 (918) 779 - 7000

DOB 5/5/1980  
 Female  
 Married  
 Number of Children = 0

[Update Profile](#)  
[View Notes](#)

**Decision Notes**  
 Sara is approved for all activities

**Locations**  
[Edit Locations](#)  
 PACT

**Attributes**  
[Edit Attributes](#)  
 Childcare  
 College Transcripts for employees  
 Nursery  
 Sunday School

**1 | Profile** Each volunteer or employee has a profile within the Smart-TRAK system. This profile allows administrators to track not only their involvement with the organization, but also their training and certifications. The profile also allows administrators to communicate directly with the individual through the Email Tool, as well as approve or decline the individual for participation in events.

**2 | Update Profile** Each profile will be created with the information that you put into the system when you add the individual either through the “Add / Edit Profile” tool or through the “Upload Group” tool. However, if you need to update the applicant’s information during their tenure as an employee or volunteer, you may select this link and enter the new information in the appropriate fields. Select save to update the profile.

**3 | View Notes** Each individual profile can include notes specific to the individual based on performance and preferences. To add a note to the profile, select the “View Notes” link. Enter your note information within the pop-up window and select save to exit and update the profile.

**4 | Locations** Each individual can be assigned to multiple locations within the Conference to promote cross-church participation. To add additional locations to the applicant and make them eligible to participate in other location’s events, select the “Edit Locations” tool. Select the appropriate locations from the pop-up window and then select the save button to exit and update the profile.

**5 | Interests** Each church has the ability to approve or decline individuals based on the specific interest they have requested. This is displayed in the Interests section of the profile. *Click [here](#) to learn how to approve or decline individuals for attributes.*

(Continued)

## Training & Background Screening

[Send Invitation](#)

⑥

Training Status	Training	Invite Date	Training Renewal Date	Background Renewal Date	Report	Refs
In Process	Safe Sanctuaries Training	7/21/2011	7/21/2013	7/21/2014		
In Process	Safe Sanctuaries Training	6/21/2011	6/21/2014	6/21/2013		
In Process	Safe Sanctuaries Training	5/26/2011	5/26/2014	5/26/2014		
In Process	Safe Sanctuaries Training	3/23/2011	3/23/2012	3/23/2014		
In Process	Safe Sanctuaries Training	8/16/2010	<b>8/16/2011</b>	8/16/2012		

**6 | Training & Background Screening** Each individual profile will display the history of the applicant's training and background screening. This tool allows administrators to view which training or screening sessions has been sent to the individual, whether they have completed the training or are still in the process of completing the training, the date the invitation was sent, as well as the renewal dates for both the training and background screening. Additionally, administrators can view the individual reports associated with that session and any reference information requested as part of that session. Click [here](#) to learn how to send a training session to your individuals.

(Continued)

**Events**

⑦

Title	Location	Event Date	Event Approval
<u>Potluck Dinner</u>	Tulsa OK	1/23/2010 7:00:00 PM	

**Documents**

⑧

[Add Document](#)

Document Title	Document Type	Document Extension	Description	Created Date	Download
Resume		docx		1/7/2010 2:02:30 PM	
Teaching Certificate		jpg		1/7/2010 2:02:09 PM	

**Email Log**

⑨

Date	Email Type	View Details
7/21/2011	Training Invite: Safe Sanctuaries Training	
7/14/2011	Training Invite: Safe Sanctuaries Training - RESEND - RESEND - RESEND	
6/23/2011	Training Invite: Safe Sanctuaries Training - RESEND - RESEND	
6/21/2011	Training Invite: Safe Sanctuaries Training - RESEND	
6/21/2011	Training Invite: Safe Sanctuaries Training	

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 Item 1 to 5 of 17

**7 | Events** This tool allows administrators to both invite and approve individuals for specific events. Events are added to each profile by the individual through their Smart-TRAK account (created when they complete their first training or screening session). To approve or decline an individual for an event, select the icon located under the Event Approval heading. From the pop-up window, select the appropriate approval setting, and select the save button to exit the window and update the profile.

**8 | Documents** Administrators can store corresponding documents to each individual profile, such as resumes, certificates, consent forms, etc. To add a document to the report, select the 'Add Document' link. In the pop-up window, complete the required fields and attach the document to the report by selecting the 'Browse' button, navigating to the document, and then selecting the document from the window. To complete the addition process, select the upload button to save and exit. From this tool you may also delete documents by selecting the red "x" icon, or download the document by selecting the green arrow icon under the 'Download' heading.

**9 | Email Log** Utilizing the email tool to contact your applicants allows administrators to update individuals on newly required training, event details, or reminders for background screening. Each correspondence is logged into the Email Log feature for each profile. To review the details of a particular correspondence, locate the desired email and select the yellow notepad icon located under the 'View Details' header. You may then view the details of the correspondence or resend the email as required.

## SENDING A TRAINING OR BACKGROUND SCREENING INVITATION IN SMART-TRAK

**Send Invite**

Training ---Select Training--- 1

Applicant Email 2

First Name

Middle Name

Last Name

Invitation Sent By Chad Stair 7/30/2010 8:24:55 AM

**References Required** 3

Personal References 0

**4 Bill To**

☐ Applicant ☒ Organization

**Recurrence**

Indicate the frequency (in months) of training or background screening for this applicant. If this will be a one-time screening please enter "0".

5 Training 0 months (0-36)

Background Screen 0 months (0-36)

Send! Cancel

**1 | Select Training** The first step in sending a training or background screening invitation is to select the training session you would like to invite your applicant to. From the drop down menu, select your desired training session. If your location has the ability to request background screening on the individual, a package selection tool will also be displayed where you can select the appropriate background screening package.

**2 | Applicant Information** Next, enter your applicant's email into the Applicant Email field. If your applicant already exists within the system, the First, Middle and Last Name will be populated with the stored information. If the applicant you are entering is attempting to use an email address that is already in use, a notification will alert you to enter a different email address. If you have not yet entered an applicant profile for the individual you are sending training to, a profile will be created upon sending the invitation.


**3 | References Required** Based on your church or conference qualifications, your individual may be required to provide references prior to employment or volunteering. To set the required number of references for your applicant, select the appropriate number from the drop down menu.

**4 | Bill To** Each administrator has the ability to set payment responsibility to either the organization to the applicant. By selecting the organization, the screening and training will be billed to your monthly statement. Selecting the applicant will require the applicant to provide electronic payment when they attempt to complete their training session.

**5 | Recurrence** Based on your church or conference qualifications, select the recurrence for each training or background screening session in months. To send the invitation, select the Send button.

## ADDING AND EDITING INDIVIDUAL ATTRIBUTES IN SMART-TRAK

**Sarah Smith - sarah.smith@gmail.com**  
Approved on 8/17/2011



[7131 Riverside](#)  
[Tulsa OK 74136](#)  
[sarah.smith@gmail.com](#)  
 (918) 779 - 7000

DOB 5/5/1980  
 Female  
 Married  
 Number of Children = 0  
[Update Profile](#)  
[View Notes](#)

[Update Profile Picture](#)

**Decision Notes**  
 Sara is approved for all activities

**Locations**  
[Edit Locations](#)  
 PACT

**Attributes**  
[Edit Attributes](#) **1**

☒ Childcare
 

☐ Preschool

☐ College Transcripts for employees  
☐ counselors  
☐ Nursery  
☐ Sunday School  
☐ Usher

**1 | Attributes** To edit an individual for a particular attributes, you will need to navigate to the interest section of their profile. This can be done by either selecting the applicant's name from the Smart-TRAK Administration home page, or by selecting the Manage >> Attributes link from the Smart-TRAK Tools box. When the Edit Attributes link is clicked, you will be able to check off which attributes you would like for the employee or volunteer to have. More attributes may be added by selecting Manage >> Attributes under the Smart-Trak Tools.